



# Email and Calendar Integration Guide

For administrators setting up email and calendar integrations for ZoomInfo Copilot

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Connecting your users' email and calendars to ZoomInfo Copilot enables your users to:

- **View a complete timeline of their team's engagement** with an account or contact including emails and meetings.
- **Be able to craft and send emails** without leaving Copilot.
- **Dig into account summaries** using activities and insights in context, in real time, without leaving Copilot.
- **Sync your user's email and calendar contacts** with ZoomInfo so users are working with the latest and most accurate contact information.

## Prerequisites and Considerations

Review the following prerequisites and considerations.

### ZoomInfo Copilot

Email and calendar integrations are *only available with ZoomInfo Copilot*. If the Email and Calendar integrations have a lock icon in the Admin Portal, you don't have a supported package. Contact your ZoomInfo account or customer success manager for more details on upgrading to an appropriate package.

### Connection Options

You can choose to connect email and calendars on behalf of your users (*Admin Managed*), or let your users connect individually (*User Managed*).

The Admin Managed configuration is the preferred method, as it provides admins with consolidated control over the email/calendar connections of all Copilot users in your organization.

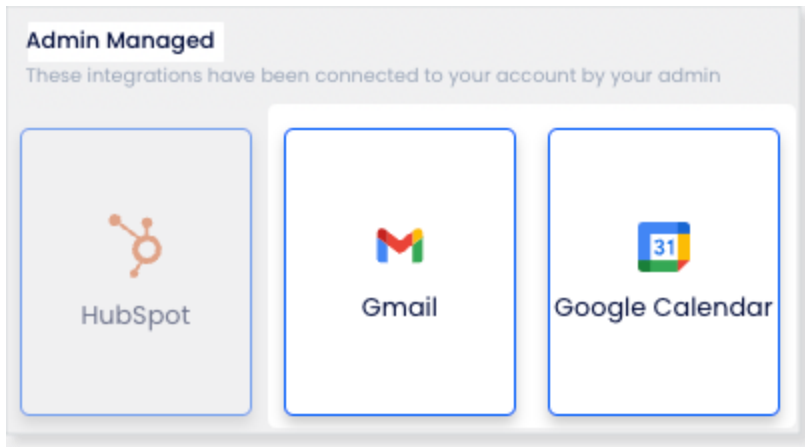
Each provider has two apps - one for Email, and one for Calendar. For full ZoomInfo Copilot functionality, you'll want to install both.

### Admin Managed Connection

This document describes how to set up an admin-managed email/calendar connection for your ZoomInfo Copilot users.

Using the Admin Managed connection option, individual users do not need to connect. Once a Google or Microsoft admin sets up the email and calendar integration, users defined in the org will automatically have their email and calendars synced.

Once the admin makes the connection, users will see these connected integrations in their settings (click your initials and select **Settings > Integrations**).

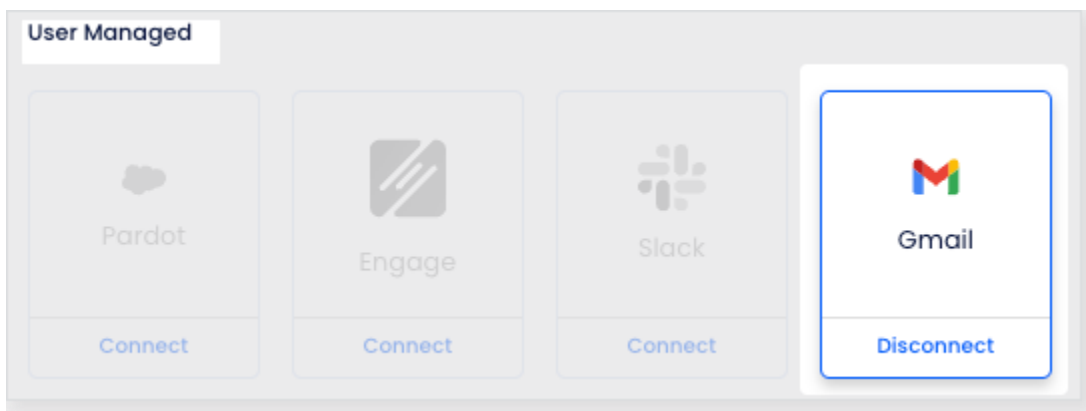


## User Managed Connection

With this option, Individual users can authenticate and connect their email and calendar from ZoomInfo Copilot.

**Note:** If you establish an [Admin Managed connection](#) is for your organization, users will not see the option to connect.

1. Click **initials > Settings**.
2. Click the **Integrations** tab.
3. Choose the appropriate **Microsoft** or **Google** email or calendar tile and click **Connect**.
4. Follow the prompts to authenticate and connect. If successful, the tile will display **Disconnect**.



By connecting either the email or calendar apps for Microsoft or Google, both apps are now connected.

## Required Provider Credentials

In order to successfully install the ZoomInfo app from the Google or Microsoft marketplace, you'll need admin credentials.

- **For Google:** You must be signed in as a Google Admin
- **For Microsoft:** You will be prompted to sign in as a Microsoft Admin

## Microsoft Admin Resources

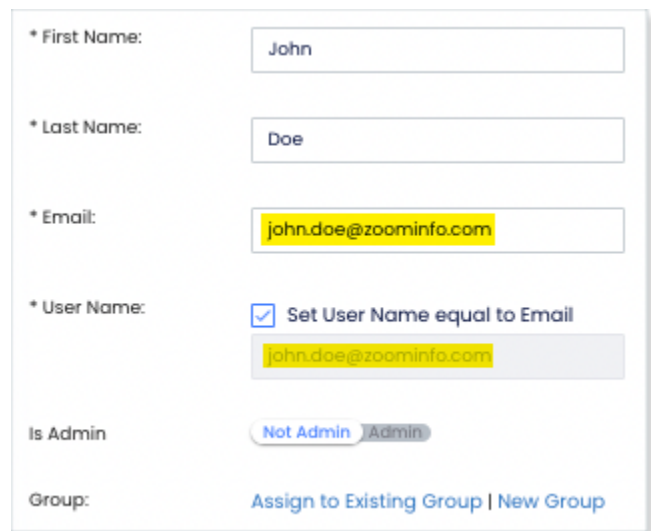
For Microsoft organizations, grouping your Copilot users requires some expertise in Microsoft admin roles and permissions which are beyond the scope of this document. Here are some helpful resources:

- [Assign admin roles in the Microsoft 365 admin center](#)
- [Configure the admin consent workflow - Microsoft Entra ID](#)
- [Grant tenant-wide admin consent to an application - Microsoft Entra ID](#)
- [Microsoft Entra built-in roles - Microsoft Entra ID](#)

## Ensure User Names and Email Addresses Match in ZoomInfo

1. Go to the **Admin Portal > User Management** tab.
2. For each Copilot user, ensure that:
  - a. The **Email** and **User Name** fields are valid email addresses that users can access for reading and sending emails.
  - b. These two fields match.

In most cases, these fields will already match, but it's important to confirm this for email or calendar sync to succeed.



The screenshot shows a user management form with the following fields and values:

- \* First Name: John
- \* Last Name: Doe
- \* Email: john.doe@zoominfo.com
- \* User Name:  Set User Name equal to Email  
john.doe@zoominfo.com
- Is Admin:  Not Admin  Admin
- Group: [Assign to Existing Group](#) | [New Group](#)

## Grouping Your ZoomInfo Users

You should ensure that email or calendar sync is limited to your Copilot users.

### Grouping Google Users

We recommend using a **Google group** to organize your users for a least permissions configuration.

You can use an **organizational unit** if the unit exactly matches your ZoomInfo user base, but a **group** is the preferred option.

- Either of these methods helps you limit the sync to only your ZoomInfo users.
- You'll still be able to turn off sync for individual users in the group if you choose.
- You'll select this group when you make the connection.

## Grouping Microsoft Users

By default, the Microsoft email and calendar apps will install for your entire org. For a least permissions configuration, you can restrict access to specific users within Microsoft 365 by creating a security group and two separate [Microsoft 365 Application Access Policies](#) associated with the security group - one policy for calendar and one for email. Copilot users can then be added to the restricted security group.

**Note:** You can do this before or after you install the apps.

### Procedure

1. Create a new security group in Microsoft 365. You'll use this same security group for both the calendar and email apps.
2. Name the group using your current naming conventions. (e.g., *zoominfo-sales-users*).
3. Using PowerShell, create an [application access policy](#) to restrict ZoomInfo **calendar app access** to only this group, similar to the following example:

```
New-ApplicationAccessPolicy -AppId f8fef3d2-3d9d-4017-a26f-c2b18937c168 -  
PolicyScopeGroupId zoominfo-sales-users@yourdomain.com -AccessRight  
RestrictAccess -Description "Restrict the ZI calendar app to members of  
distribution group zoominfo-sales-users."
```

- **AppId:** Copy the AppId for the calendar app from the example above and paste it in PowerShell.
  - **PolicyScopeGroupId:** Use your security group name (e.g., *zoominfo-sales-users*) and company domain (e.g., *yourdomain.com*).
  - **Description:** Include a contextual description.
4. Using PowerShell, create a second [application access policy](#) to restrict ZoomInfo **email app access** to the same group, similar to the following example:

```
New-ApplicationAccessPolicy -AppId 053d94d2-6e0a-4fba-a3c3-86fa872a6205 -  
PolicyScopeGroupId zoominfo-sales-users@yourdomain.com -AccessRight  
RestrictAccess -Description "Restrict the ZI email app to members of distribution  
group zoominfo-sales-users."
```

- **AppId:** Copy the AppId for the email app from the example above and paste it in PowerShell.
- **PolicyScopeGroupId:** Use your security group name (e.g., *zoominfo-sales-users*) and company domain (e.g., *yourdomain.com*).
- **Description:** Include a contextual description.

## What Happens Next

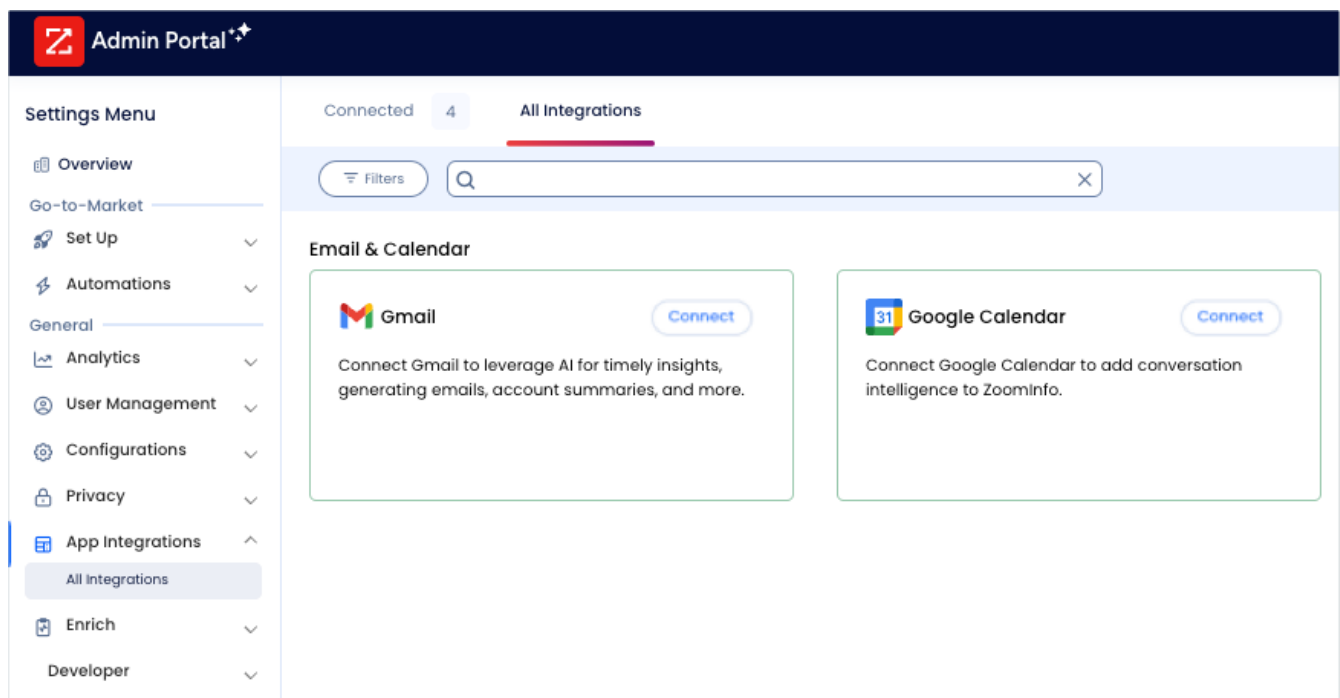
The policies will grant the ZoomInfo apps access to only the calendar events and emails of Copilot users within the security group and restrict ZoomInfo from reading the data of any other user in the tenant.

It may take up to one hour for access to be restricted to the security group.

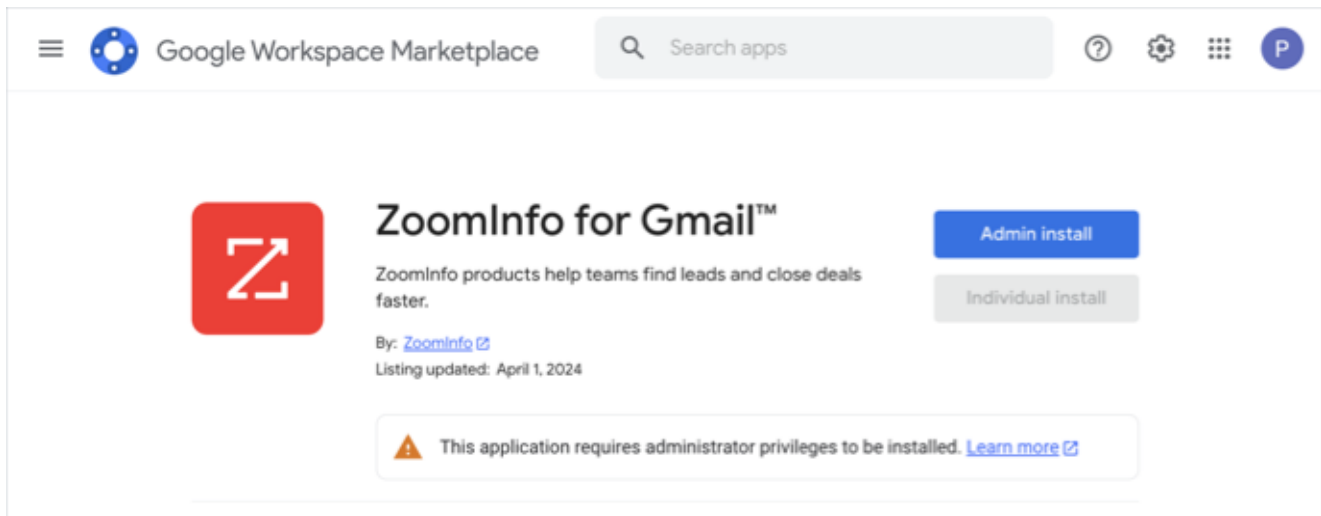
## Connect the Google Email or Calendar Apps

Perform this procedure for both the email and calendar apps.

1. Log in to Copilot and navigate to the **Admin Portal**.
2. Open another browser tab and sign into the Google console as an admin. The app install will recognize that you're already connected and use this to validate the connection.
3. In the Admin Portal, go to **App Integrations > All Integrations** and search for the **Gmail** or **Google Calendar** app.



4. Click **Connect** on one of the apps. You are taken to a new tab that shows the ZoomInfo app in the Google Workspace Marketplace (e.g., *ZoomInfo for Gmail* in this example)



**Note:** Here are the direct URLs to each app.

- **ZoomInfo for Gmail** app URL:

[https://workspace.google.com/marketplace/app/zoominfo\\_for\\_gmail/711918189885](https://workspace.google.com/marketplace/app/zoominfo_for_gmail/711918189885)

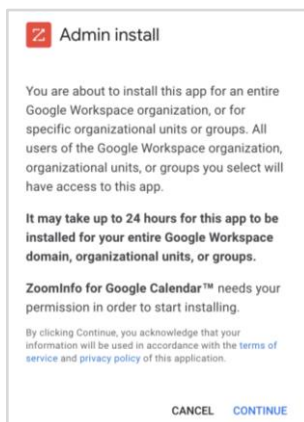
- **ZoomInfo for Google Calendar** app URL:

[https://workspace.google.com/marketplace/app/zoominfo\\_for\\_google\\_calendar/635708537658](https://workspace.google.com/marketplace/app/zoominfo_for_google_calendar/635708537658)

5. Click **Admin Install**.

**Important:** You must have Google admin credentials. ZoomInfo cannot cross-check whether your credentials are correct. You won't be able to install the app (the **Admin Install** button will be grayed out). However, because you initiated the connection, the app icon in the ZoomInfo Admin portal will indicate that you're connected, but it will not be connected.

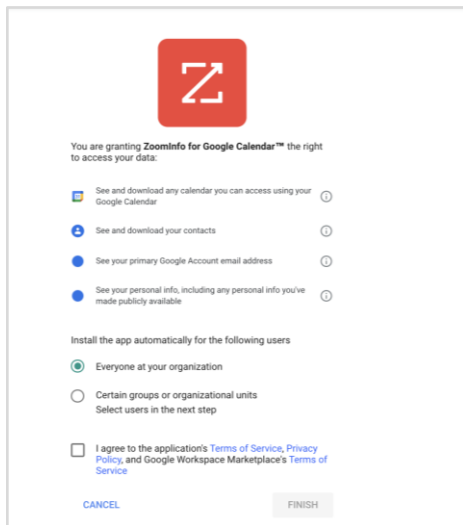
6. Click **Continue**.



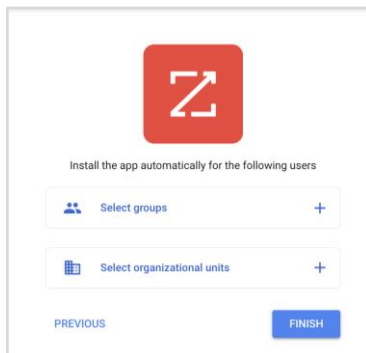
7. On the second acceptance page, make sure you:

- a. Select the **Certain groups or organizational units...**

b. Click the **I agree...** checkbox.

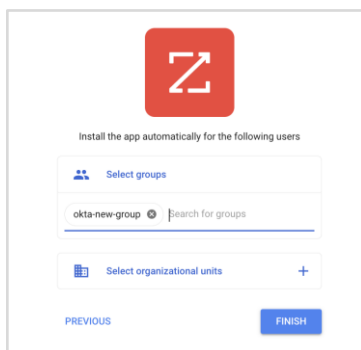


8. You're prompted to select an org unit or group.



9. Select an [appropriate org unit or group](#) and click **Select**.

10. Click **Finish**.



11. Return to the ZoomInfo **Admin Portal** tab.

12. Wait a few seconds and you'll get a success message.

13. Repeat this procedure for the other Google app.



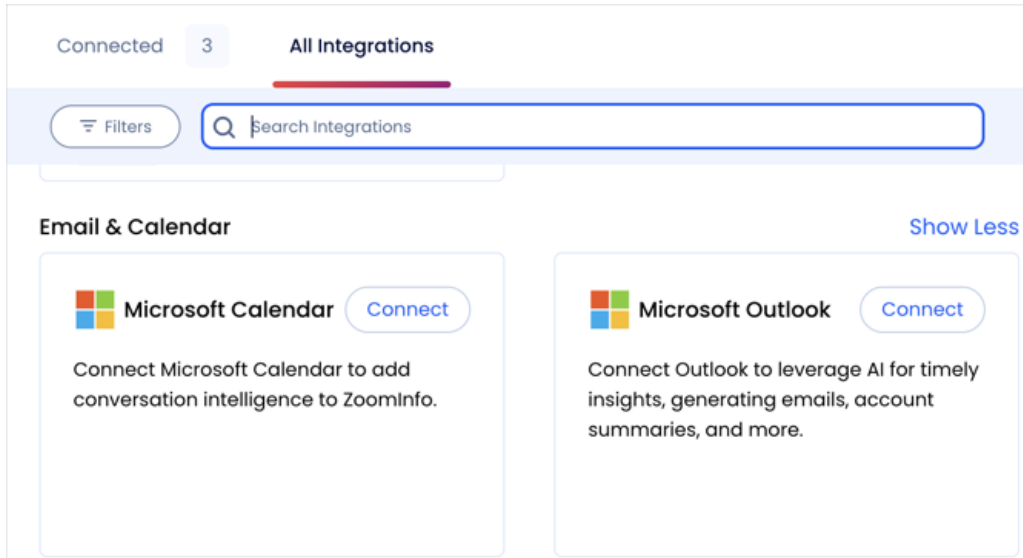
- Once installed, the toggle for the apps are enabled by default in the ZoomInfo Admin Portal. Go to [Managing Users](#) to remove any individual user whose mailbox/calendar you don't want to sync.

## Connect the Microsoft Email or Calendar Apps

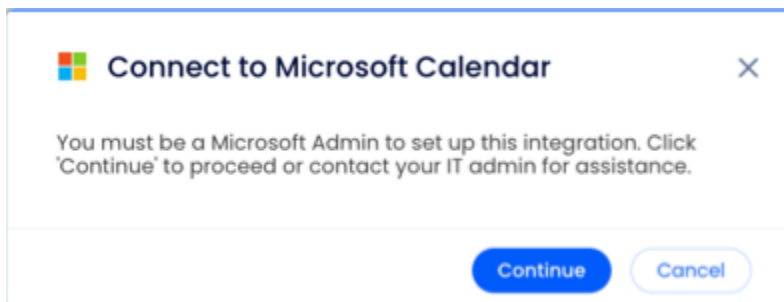
To make this connection, you must be a ZoomInfo admin with Microsoft Office 365 admin credentials.

Perform this procedure for both the Email and Calendar apps.

- In the Admin Portal, go to **App Integrations > All Integrations** and search for the **Microsoft Outlook** or **Microsoft Calendar** app.



- Click **Connect**.



**Important:** Ensure that you are using Microsoft Admin credentials to make the connection.

- Click **Continue** and log in using your admin credentials.
- As a last step in the authentication process, a **Permissions requested** popup displays. Review and click **Accept**.
- You are returned to the ZoomInfo Admin Portal. Wait a few seconds and you'll get a "You are all set up" message.
- Repeat this procedure for the other Microsoft app.

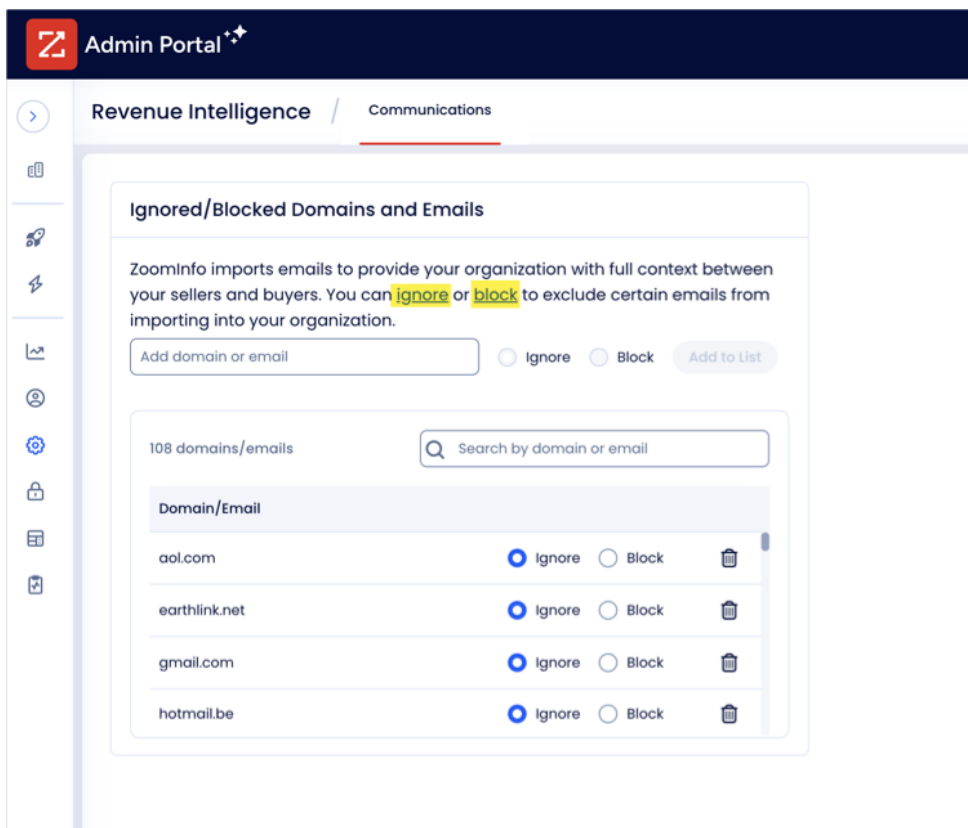
- By default, both the email and calendar apps are installed for your entire organization.
- If you followed the earlier recommendation to [group your users](#) by setting up a Microsoft 365 security group and limiting app access to only this group, the ZoomInfo app will only sync the email/calendar for users in the security group.

7. Go to [Managing Users](#) for details on user management.

## Ignore or Block Domains and Emails

As an admin, you can ignore or block certain domains and email addresses from being included in synced email data.

1. In the Admin Portal, go to **Configuration > Revenue Intelligence**.
2. On the **Communications** tab, we provide a default list of ignored domains that likely wouldn't include context between buyers and sellers (e.g., gmail.com, hotmail.com, etc.).
  - You can choose to add more domains (or email addresses) to ignore.
  - You can remove any of the domains ignored by default.
  - You can also choose to block additional domains or email addresses.



3. Hover over the ignore or block link for details on the effect of ignoring or blocking domains or email addresses.

### Ignore

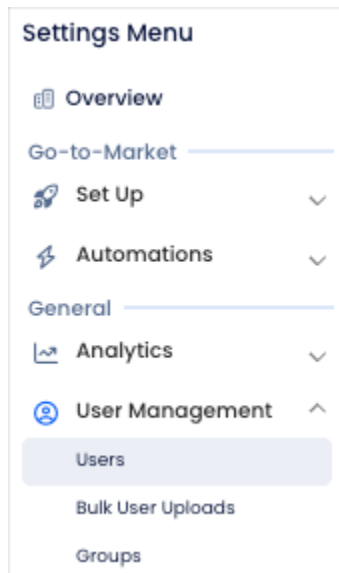
- This works best for emails that do not provide context between buyers and sellers.
- Emails exchanged between users marked as 'Ignore' and a non-ignored user will be ingested.
- Emails between 'Ignore' users and other ignored users, blocked users, or external companies will not be ingested.
- Emails that only include sellers can be excluded by adding your domain to the 'Ignore' list.

### Block

- This works best for sensitive communications.
- Emails exchanged between users marked as 'Block' and any other users or external companies will not be ingested.
- Customers often block domains or email addresses of sensitive parties like their CEO's email address or contracted law firm's domain.

## Managing Users

Once you complete the connection, your Copilot user base will initially include all users defined as ZoomInfo users in the ZoomInfo **User Management** tab.



## Manage User Data Sync for Google

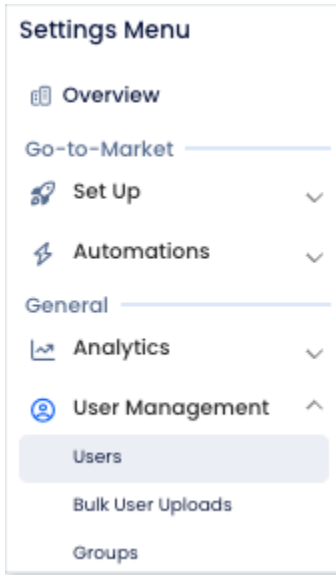
You can choose to opt out of specific users from email or calendar sync. Perform this procedure for both the Google email and calendar apps.

1. From the **Connected** tab on the Admin Portal Integrations page, click **Actions ... > Manage User's Sync Data** next to the email or calendar integration you've connected.



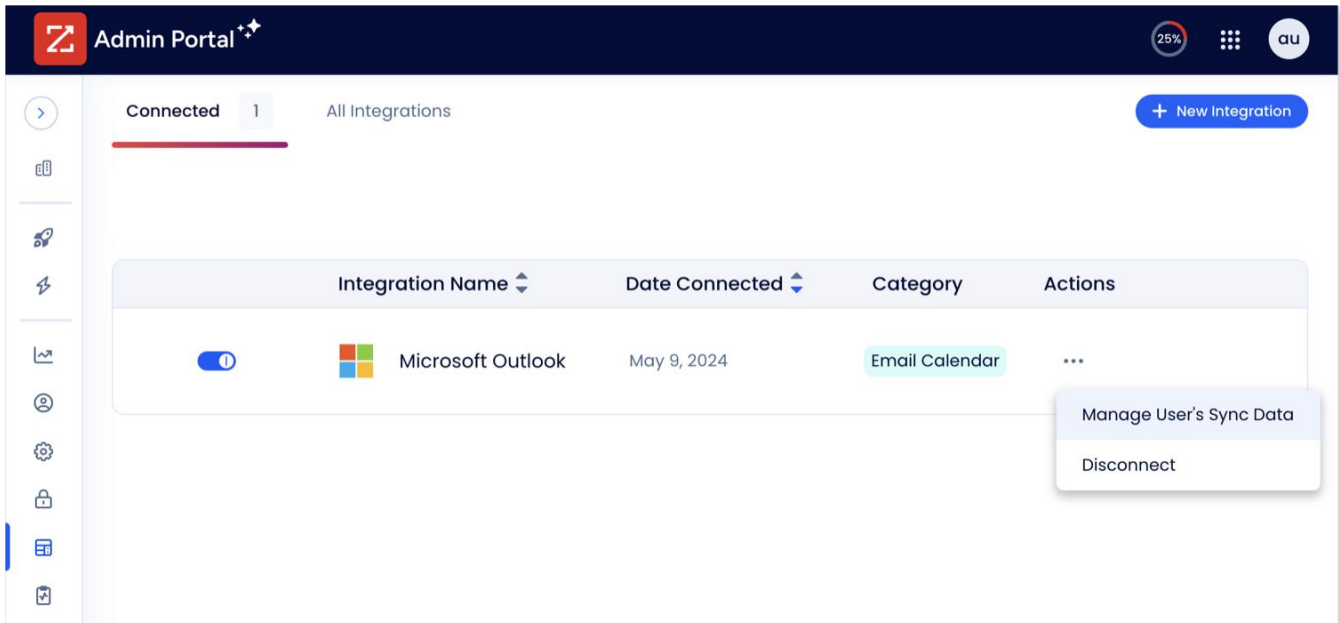
## Manage User Data Sync for Microsoft

Once you complete the connection, your Copilot user base will initially include all users defined as ZoomInfo users in the ZoomInfo **User Management** tab.

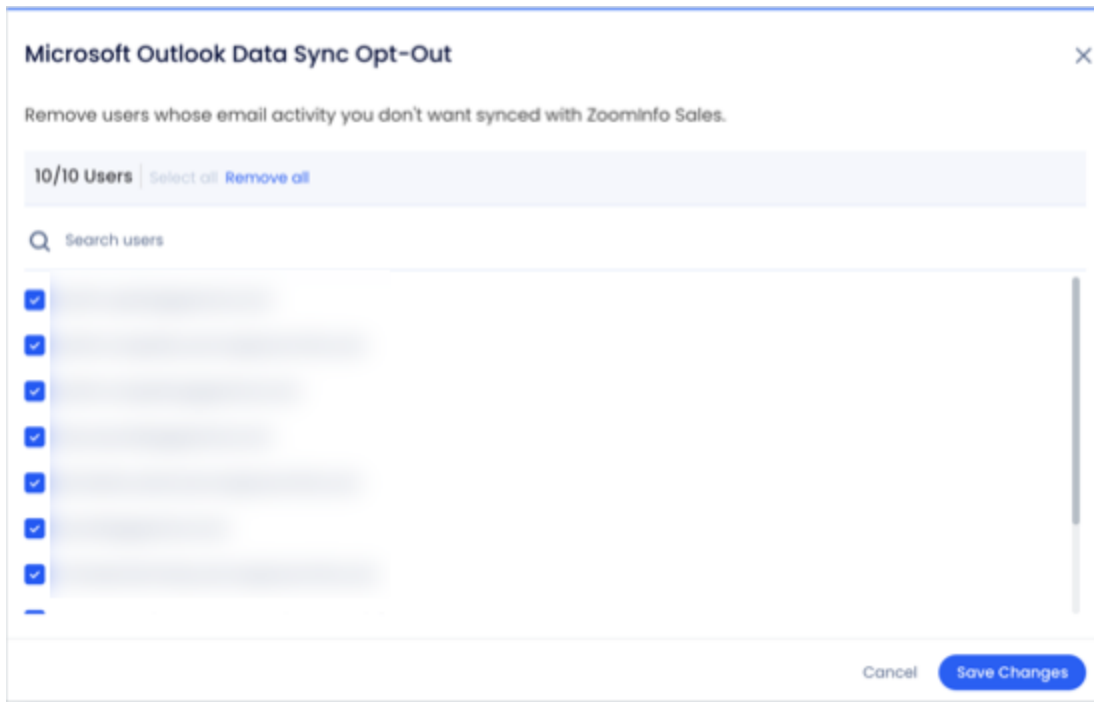


You can choose to opt out specific users from email or calendar sync.

1. From the **Connected** tab on the Admin Portal Integrations page, click **Actions ... > Manage User's Sync Data** next to the email or calendar integration you've connected.



3. Unselect users as needed and click **Save Changes**.



## Security Group Configuration

When you installed the Microsoft email and calendar apps, you installed them for your entire Microsoft 365 organization.

- To ensure that only Copilot users email and calendars were synced, we recommended [setting up a Microsoft 365 security group](#) in which you add your Copilot users, and then create an application access policies to restrict email and calendar access to only this security group.
- If you haven't done this, you can still do it after you've installed the apps.
- This configuration requires some expertise in Microsoft admin roles and permissions which are beyond the scope of this document. Here are some helpful resources:
  - [Assign admin roles in the Microsoft 365 admin center](#)
  - [Configure the admin consent workflow - Microsoft Entra ID](#)
  - [Grant tenant-wide admin consent to an application - Microsoft Entra ID](#)
  - [Microsoft Entra built-in roles - Microsoft Entra ID](#)

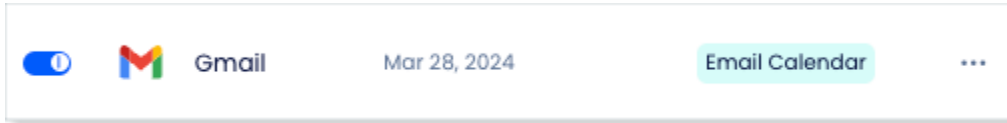
When you use a security group, it takes precedence over sync settings for users listed in the **Data Sync Opt Out** page in the Admin Portal. If a user is:

- Included in the security group, you can opt that user out on the **Data Sync Opt Out** page in Copilot.
- Not included in the security group, their email/calendar will not be synced, even if listed on the Data Sync Opt Out page.

**Note:** If you chose not to use a security group, the email and calendar apps are installed for your entire org, but only users listed on the User Management tag are eligible to be synced. You can opt out any of these users from sync using the Admin Portal's Data Sync Opt Out page.

## Managing the Connection

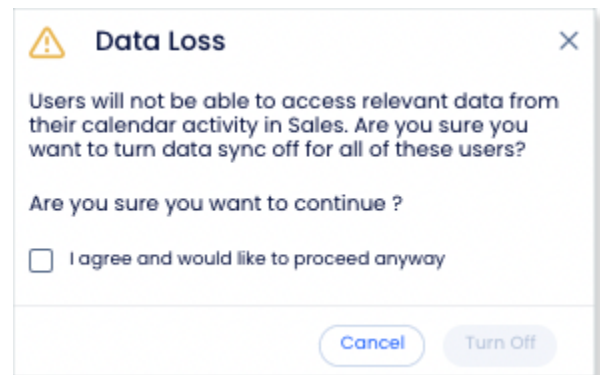
Once you successfully install the app, the toggle is automatically enabled.



### Toggling the Integration OFF

You can turn the toggle OFF for an email or calendar connection at any time to stop syncing.

- For email connections, users will not be able to access relevant data from their email activity in Copilot, but they will retain the ability to send emails.
- For calendar connections, users will not be able to access relevant data from their calendar activity in Copilot.



When you attempt to set the toggle to OFF, a warning message displays.

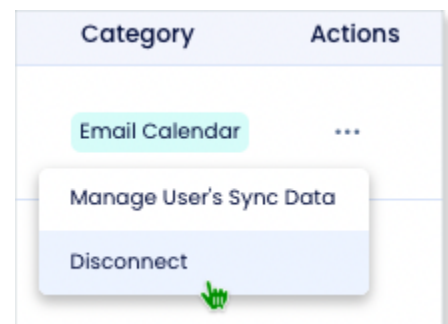
**Important:** Use caution when turning the toggle OFF. If you subsequently turn the toggle back ON, you'll need to [edit the user settings](#) to remove any individual users you don't want synced, as all users will be initially included in sync.

### Disconnecting the Integration

You can disconnect the integration by clicking **Actions ... > Disconnect**.

**For the Email integration:** When disconnected, all users' email accounts will be unsynced and will no longer have the capability to send emails from Copilot.

**For the Calendar integration:** When disconnected, all users' calendars will be unsynced. Users will no longer see their calendar activities synced in the activity feed for a company.



## User Experience

See the following ZoomInfo Knowledge Center articles that detail the user experiences enabled by syncing your users email and calendars.

### Activity Feed

Syncing email and calendars will enhance the seller experience by enriching the activity feed on a company profile in ZoomInfo. This feed displays past interactions, such as meetings and email conversations, providing a comprehensive view of previous engagements.

### AI Email

Sellers can craft and send AI-generated emails, leveraging a wide range of signals and data to ensure the message is relevant and suitably toned for any situation.

### Tracking Email Replies

When sending email from ZoomInfo Copilot, you can also track replies, out of office responses and bouncebacks if you have a CRM that is connected from ZoomInfo.